WISP CLIENTPOINT FOR THE SALVATION ARMY

1. Put in the FIRST & LAST NAMES of the CLIENT

(Note: Do not fill in any other data element.)

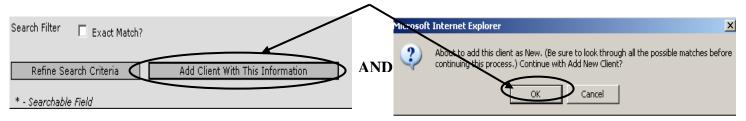
	1						
Home	▶ClientPpint	Resourct Point	ShelterPoint	Reports	Admin	Help	Logoff
Add as New / Search for Existing Client							
Last Profile	-Select-	`					
First *	Make	MI Lase*	Believe	Juffix [
SS# *							
SSN Data Quality	-Select-		•				
Date of Birth 2.3		(mm/dd/yyyy)					
Gender	- Select -	- L - II					
Race	- Select -	Search Filter	☐ Exact M	atch?			
2. Click	- Add/ FindCl	ient * - Searchau		Add As An	onymous C	lient	

3. Check to see if ther are any matching clients in POSSIBLE MATCHES.

If NO MATCHING CLIENT,



Then Click "ADD CLIENT WITH THIS INFORMATION"

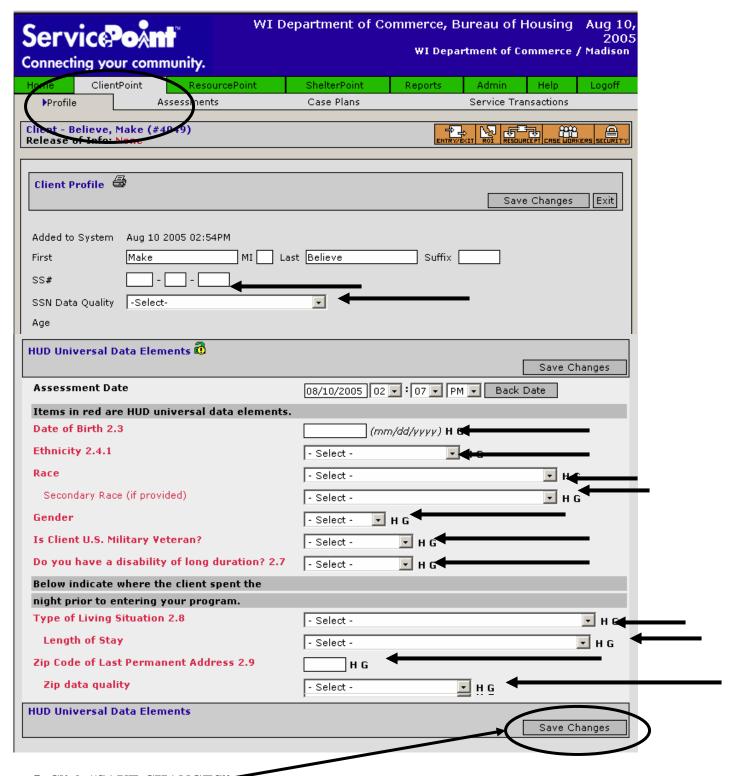


If THERE IS A MATCHING CLIENT



CLICK ON THE NAME OF THE CLIENT

4. You will automatically go to the PROFILE PAGE of CLIENTPOINT, where you should answer all of the SALVATION ARMY ASSESSMENT questions.



5. Click "SAVE CHANGES"

NOTE:

- If the CLIENT is SINGLE, GO TO RELEVANT SERVICE RECORD.
- If the CLIENT is in a HOUSEHOLD, <u>CREATE HOUSEHOLD</u> (follow steps below)

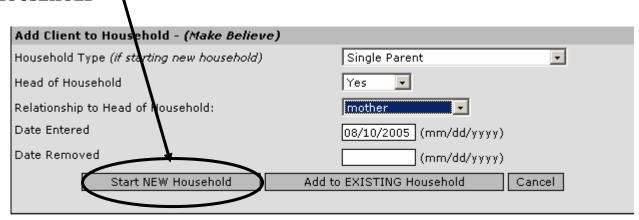
6. CLICK "ADD THIS CLIENT TO HOUSEHOLD"

Households Containing Make Believe

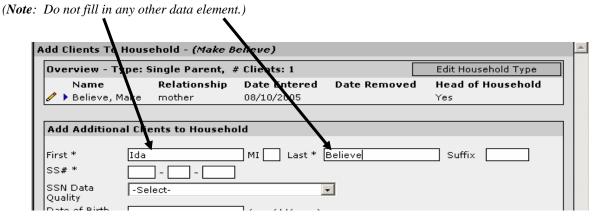
Household Type Clients in Household Relationship Date Entered Data Removed Head of Household

No Households found for this client.

7. Answer the question about who the CLIENT in the HOUSEHOLD, the Click "START NEW HOUSEHOLD"



8. Put in the FIRST & LAST NAMES of the HOUSEHOLD MEMBER



9. Click Add/ FindClient

Search Filter Exact Match?

Add / Find Client Add As Anonymous Client

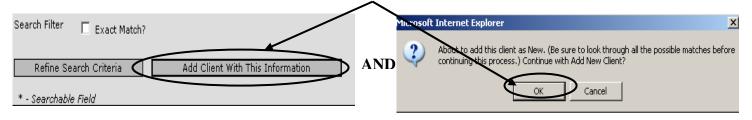
* - Searchable Field

10. Check to see if there are any matching clients in POSSIBLE MATCHES.

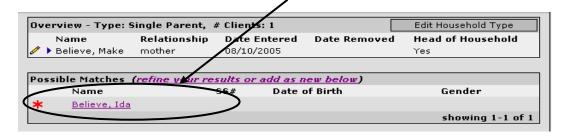
If NO MATCHING CLIENT,



Then Click "ADD CLIENT WITH THIS INFORMATION"



If THERE IS A MATCHING CLIENT,



CLICK ON THE NAME OF THE CLIENT

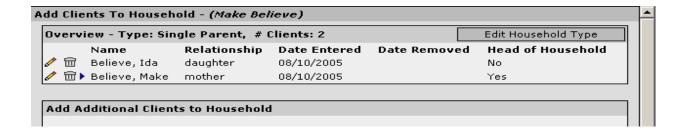
11. Fill Out "CONTINUE ADDING THE HOUSEHOLD MEMBER"



12. Click "ADD HOUSEHOLD MEMBER"

NOTE

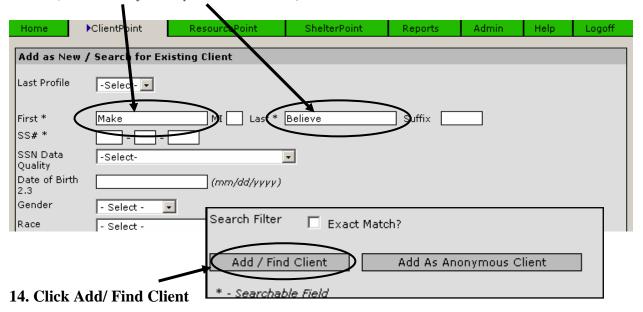
- If the HOUSEHOLD IS COMPLETE, then (follow steps below)
- If there are MORE CLIENTS IN HOUSEHOLD, then "ADD ADDITIONAL CLIENTS TO HOUSEHOLD by repeating Steps 8 -12 until Household is complete.



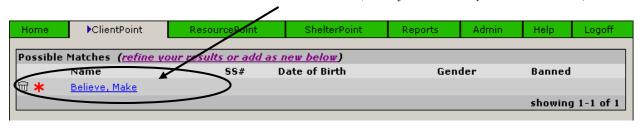
NOTE: For every individual entered into the hold complete Steps 13 - 17

13. Put in the FIRST & LAST NAMES of the CLIENT

(Note: Do not fill in any other data element.)

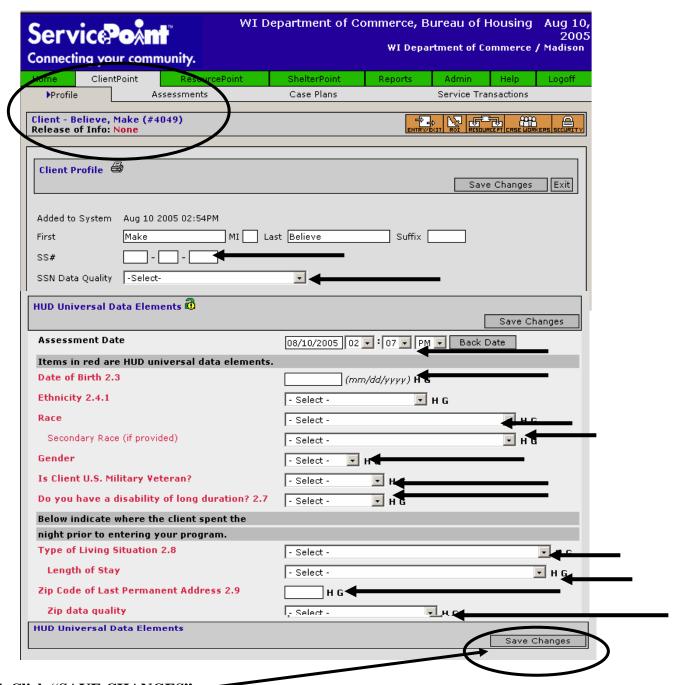


15. LOOK FOR CLIENT in POSSIBLE MATCHES – (note: if it is not here you made a mistake).



CLICK ON THE NAME OF THE CLIENT

16. You will automatically go to the PROFILE PAGE of CLIENTPOINT, where you should answer all of the SALVATION ARMY ASSESSMENT QUESTIONS.



17. Click "SAVE CHANGES"

NOTE: For every CLIENT IN THE HOUSEHOLD, the SALVATION ARMY ASSESSMENT should be COMPLETED. When all assessments are completed for everyone in the household, go to the relevant record of service.